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User Manual

How to submit an online research proposal

Prepared and published by
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Welcome!

Thank you for taking the time to read through this user manual, which is designed to assist you with submitting your research proposals online.

We have taken care to ensure that our system is as intuitive and user-friendly as possible.

As we continually improve our system, from time to time there might be small differences between what you see in this manual and what appears in the online system. Please send an email to support@neoterra.zendesk.com if you need any specific guidance.

We wish you great success with your research projects.

Sincerely
The NHRD Support Team

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Introduction

The National Health Research Database (NHRD) is a searchable, electronic repository of health research studies that have been conducted in South Africa. Its core function is to enable users to track research trends in national health priority research areas.

In addition, the Database system allows Provincial Health Research Committees (PHRCs) to manage the process of research applications. The NHRD is designed with many objectives in mind, one being to make it easier for researchers to submit their proposals online.

The NHRD system guides you through the five steps required to submit a proposal. Once saved, proposals can be worked on at a later stage, or submitted for approval immediately. The system also allows you to submit details of team members involved in your research activities. The "Comments" feature allows researchers and Research Committees to communicate with each other regarding details of proposals during the approval process.

In designing and developing this intuitive, easy-to-use system, our aim has been to prevent the uncertainties and frustrations typically experienced by users during the submission process.

This manual focuses on the online research proposal submission process. Its purpose is to instruct, guide and support you, as the end-user, on how to register, submit researcher details, and propose research studies online using the NHRD system.

Module 1 – How to find NHRD

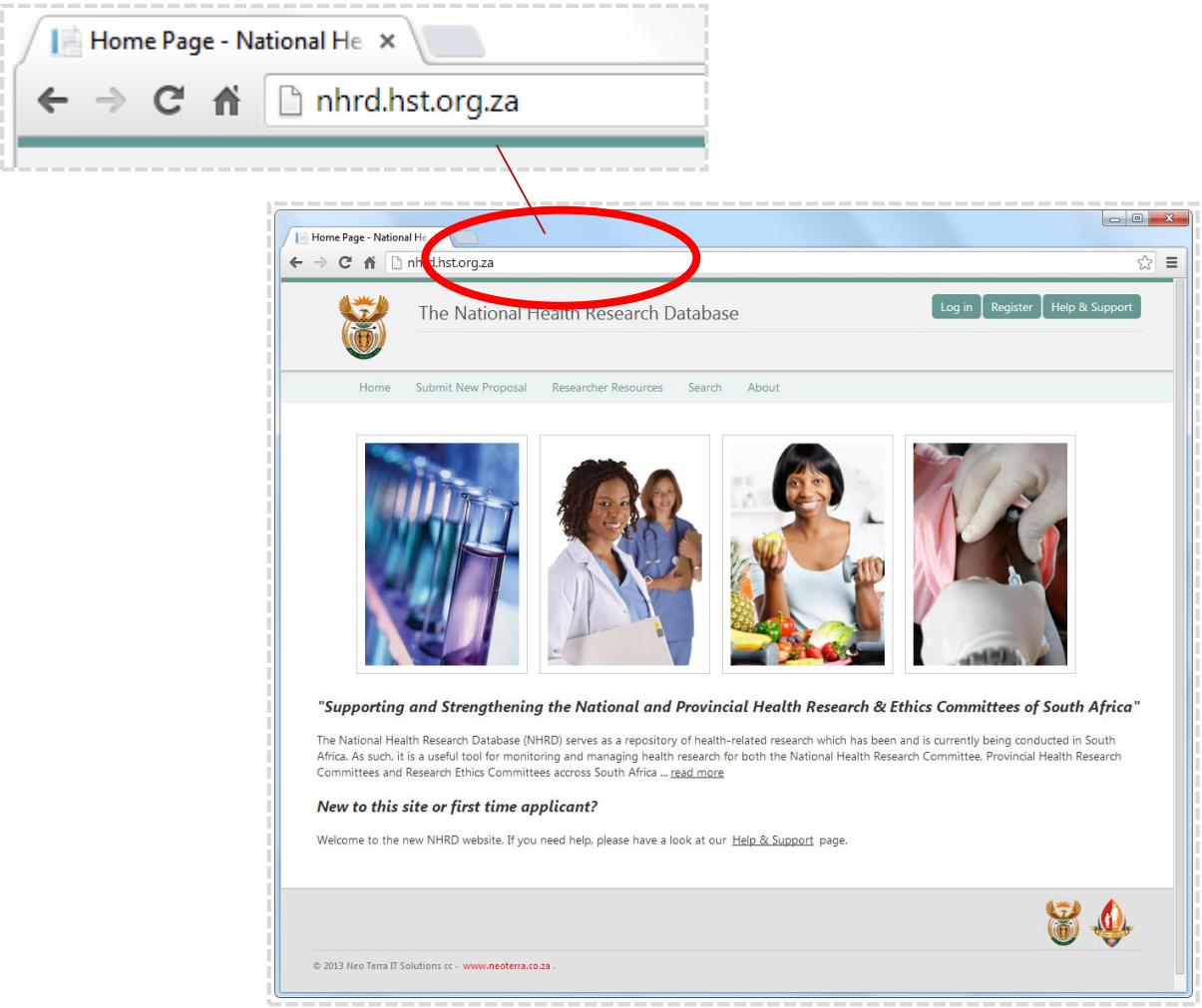
Lesson 1 - Welcome to the NHRD System

To access the NHRD system, you need a standard web browser and access to the Internet. The NHRD system works well on most web browsers, but we recommend that you use Internet Explorer, Google Chrome or Mozilla Firefox.

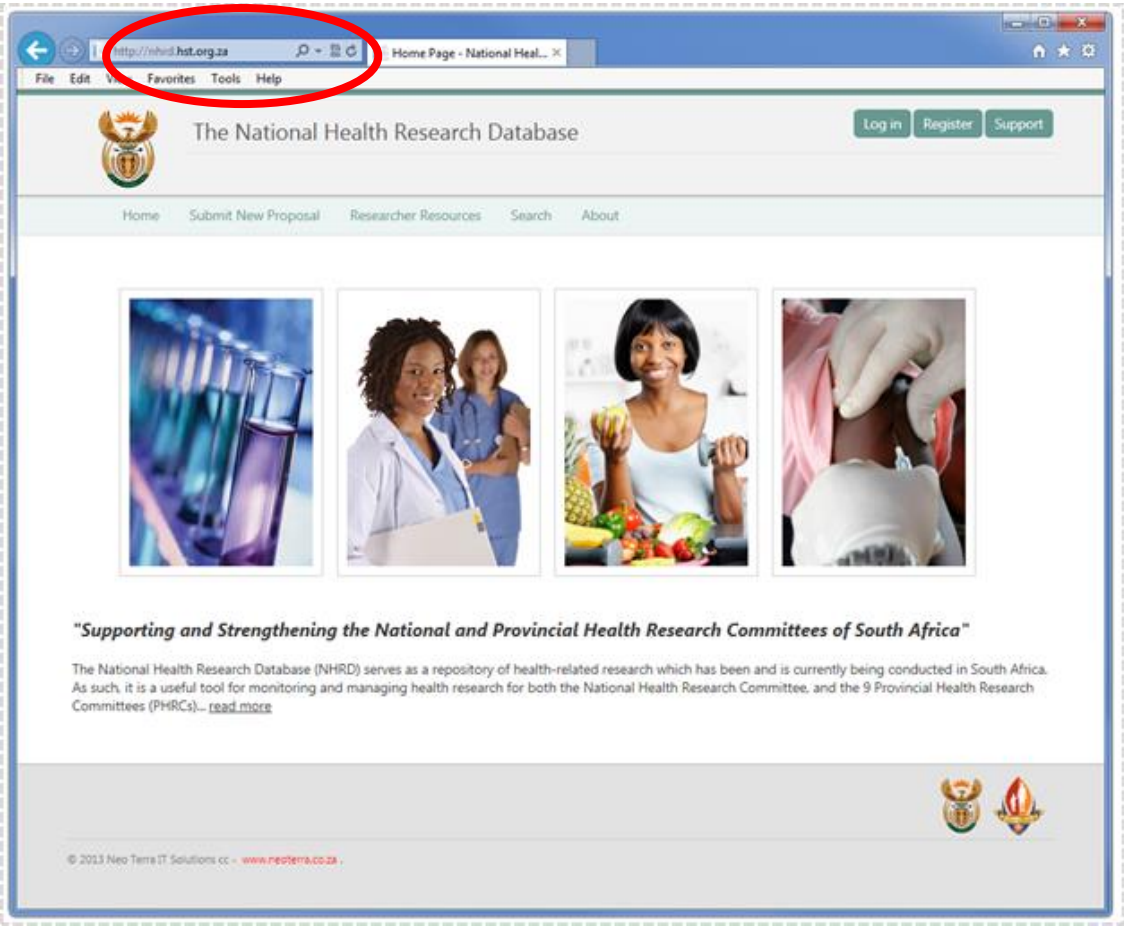
To access the site, please enter the following URL into your web browser address bar:

http://nhrd.hst.org.za

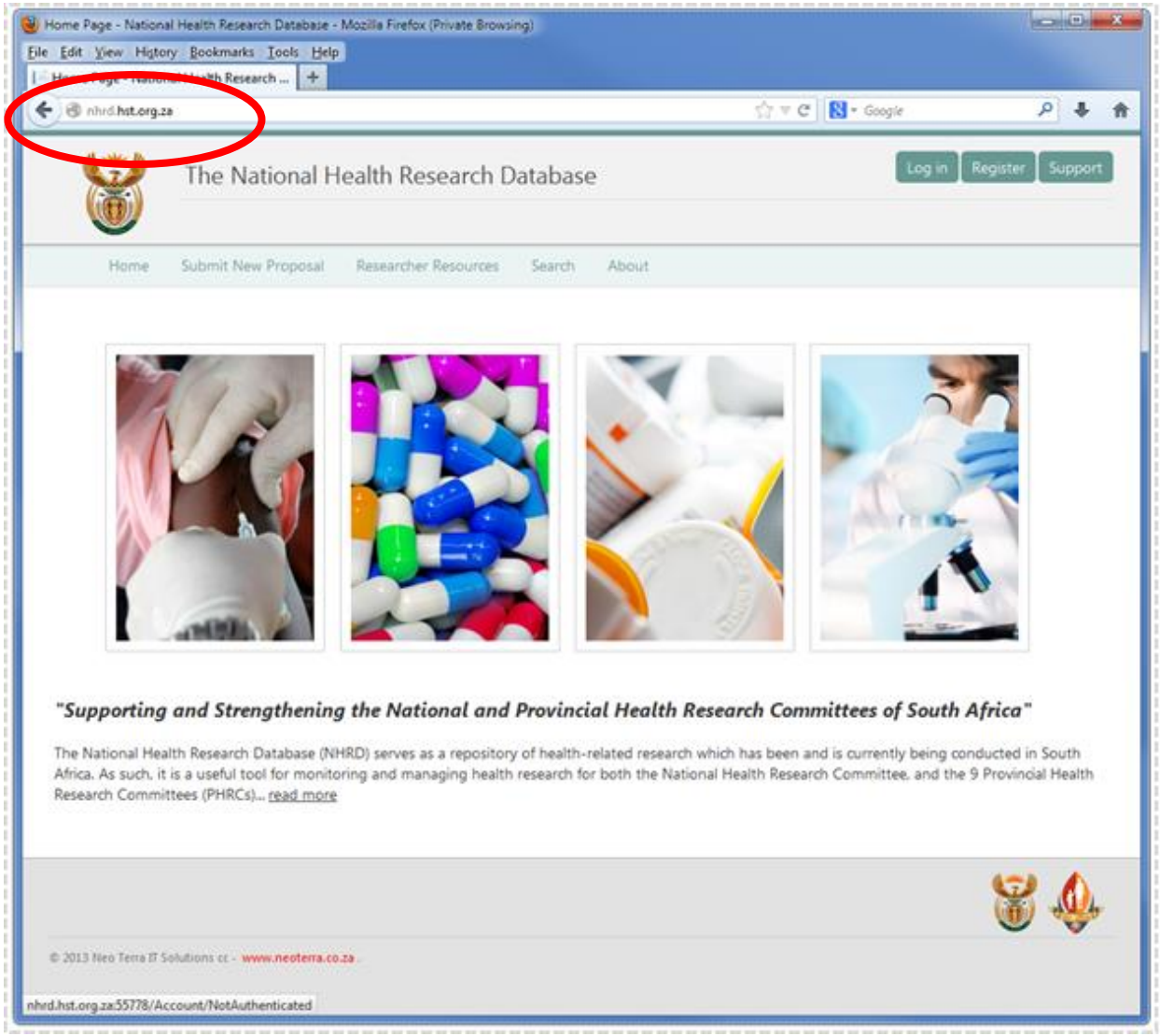
For example:



Using Internet Explorer:

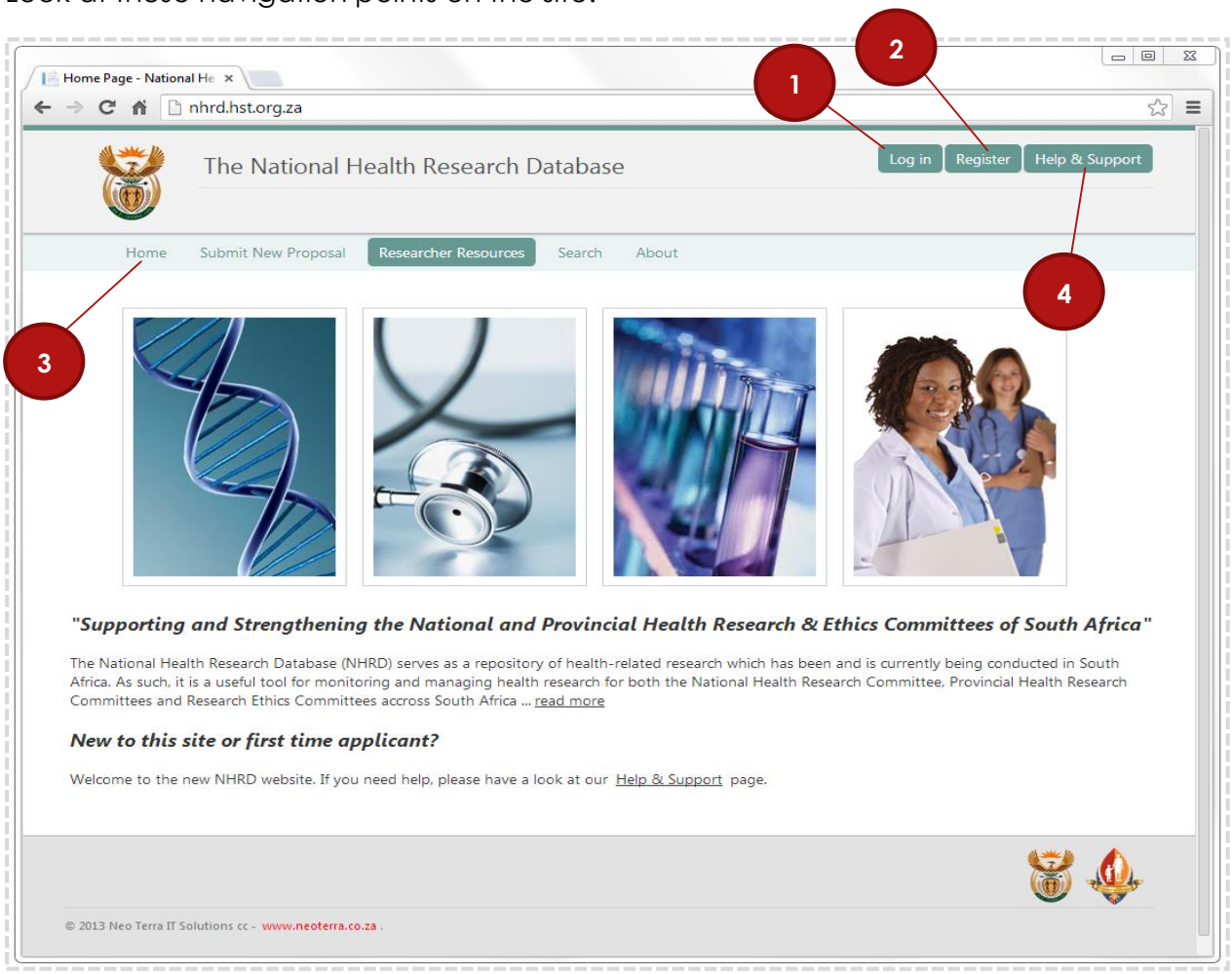


Using Mozilla Firefox:



Lesson 2 - Basic navigation

Look at these navigation points on the site:



1. Click here to log into the system. You'll have to be registered on the site before you can log in.
2. Click here to access the registration page. You'll be asked to provide some details about yourself. You only have to register once. Remember your password.
3. This is the main navigation bar. This area will change once you're logged into the system, as a few more options are offered to registered users.
4. If you experience a technical problem with the site, click here to view the NHRD Help & Support page, or send an email here. You can also send an email manually to nhrdsupport@hst.org.za

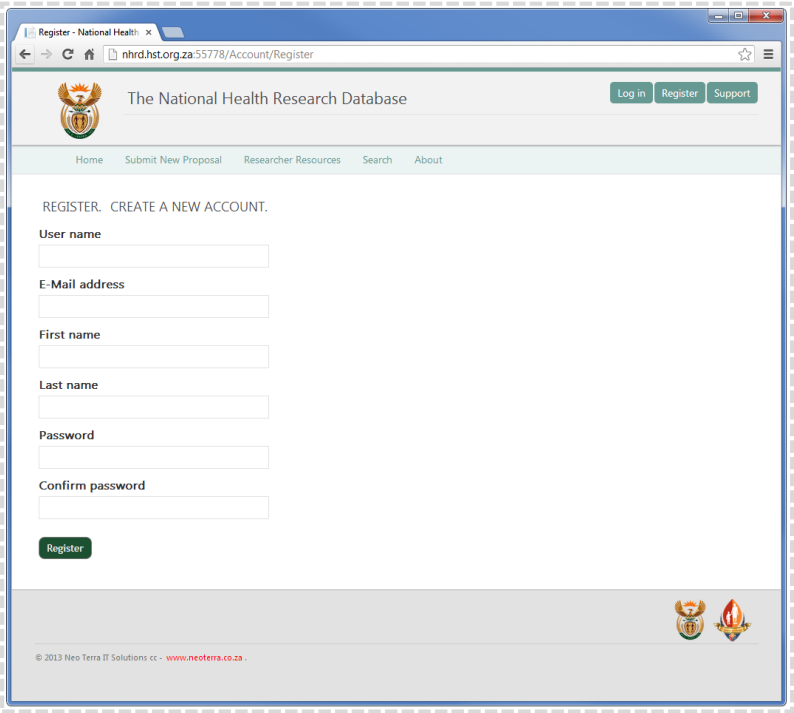
Module 2 - Registration

Lesson 1 - Registering on the site

Before you can continue, you have to register on the website.

To register, click on "Register", found in the top-right area of the main page.

This will call up the registration page. Please provide the details required in the input fields and click on "Register", found at the bottom of the page to continue.



Fill in all the required details as shown here:

REGISTER. CREATE A NEW ACCOUNT.

User name

Fred

E-Mail address

fred.smith@gmail.com

First name

Fred

Last name

Smith

Password

••••••••

Confirm password

••••••••

Register

Fill in your first and last names, email address, etc.

Choose a unique username. If it is already in use, you will have to choose another.

Click on "Register" at the bottom of the page to save your details and register on the site.

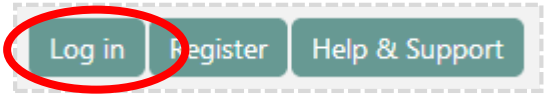
Remember your password and username.

Please note that your password must be at least six characters long. You can use any combination of letters and numbers, upper-case and lower-case.

Lesson 2 – Log in

You will need to register only once. The next time you use the NHRD system, you can log in using your registered username and password.

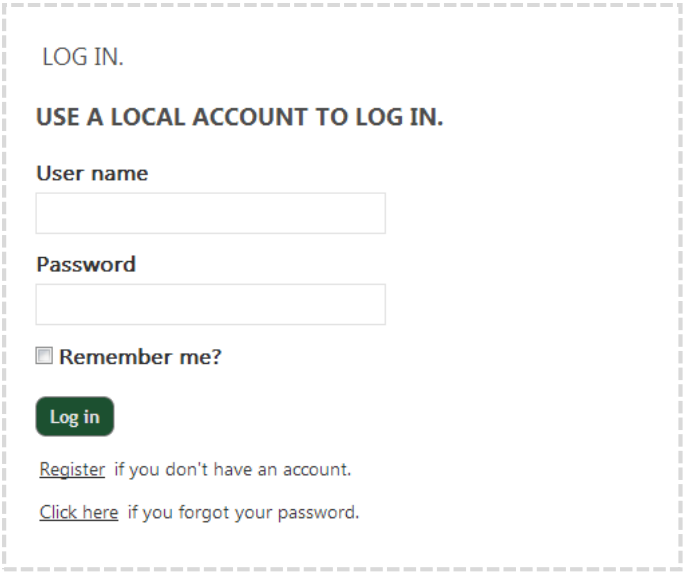
Click on "Log in" found in the top-right area of the main page.



This will call up the "Log In" page.

Please type in your registered username and password.

Your screen will look like this:

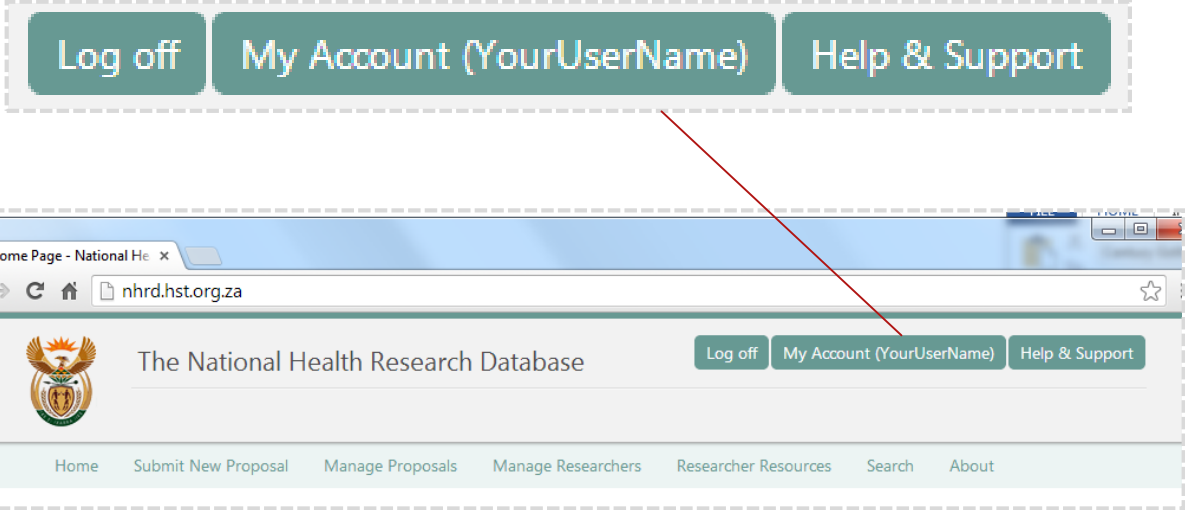


If you have forgotten your password, you can use the "Click here if you forgot your password" feature. This will email you a link allowing you to reset your password.

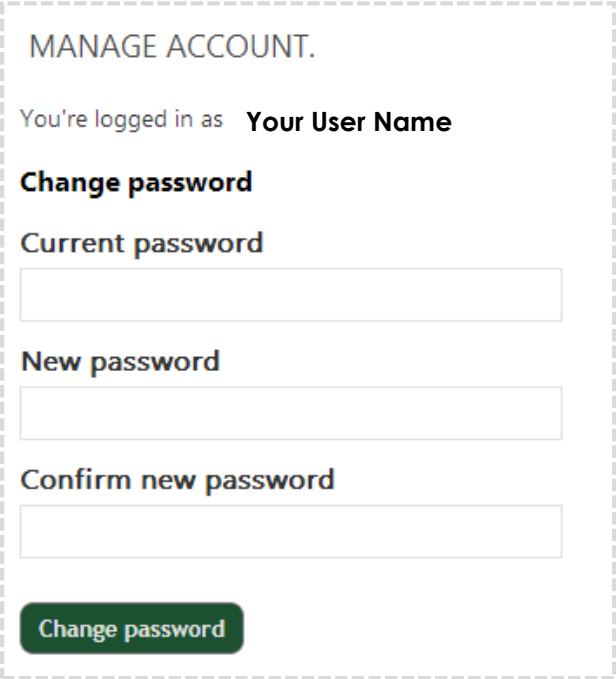
Lesson 3 – Managing your account

To change your password, log into the system using your registered password.

Then click on "Manage Account", found in the top-right corner of your screen.



This will allow you to change your current password to a new one.



Type in your existing password.

Create a new password and then repeat it in the "Confirm new password" box.

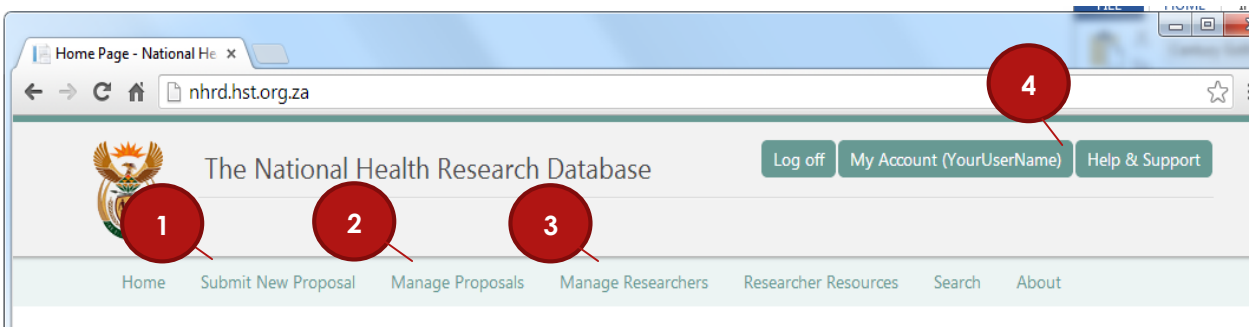
Click on "Change Password" to continue.

Please note that your password must be at least six characters long. You can use any combination of letters and numbers, upper-case and lower-case.

Lesson 4 – Researcher navigation

Once you have logged into the site, it will look slightly different from the original home page.

For example, your home screen will look like this:



1. Click here to submit a new proposal. You have to be logged into the system to activate this.
2. Click to view and manage your existing proposals.
3. Each proposal can be linked to a defined list of researchers, investigators, co-ordinators and other team members that is stored here.
4. Click to manage your account, change your password, etc.

Summary – Module 2

You have to be registered in order to submit research proposals. Once registered, you will have access to options that will allow you to:

- Upload details and curricula vitae of researchers
- Submit research proposals
- Receive feedback from research committees regarding proposals
- Submit research findings

If your registration has been successful, you will be taken back to the home page.

If not, check any validation errors that may prevent you from registering.

The table below provides a quick reference:

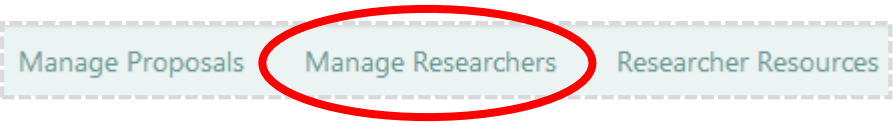
Possible Cause:	**Remedy:**
An invalid email address	Please check the format and validity of your email address
Using a username that already exists	Please choose another suitable username
Password mismatch	Please make sure that both password fields match

Module 3 – Research staff

Lesson 1 - Adding your research staff

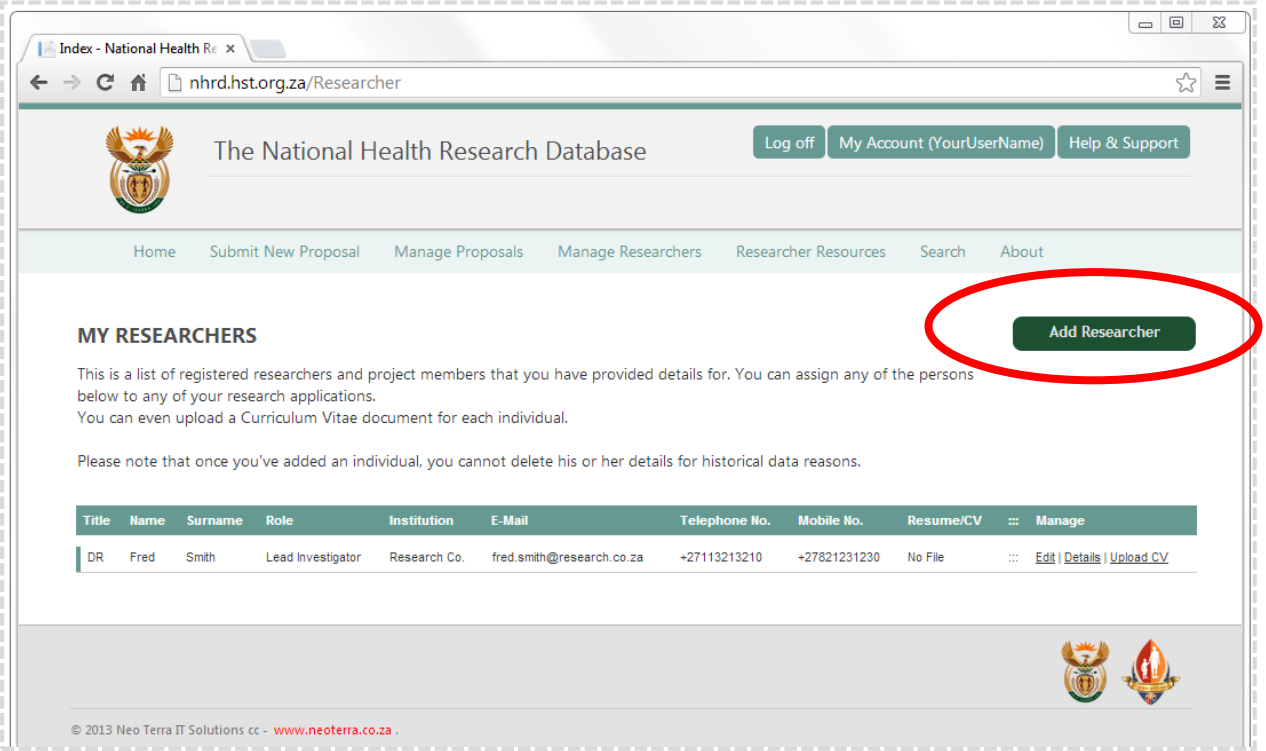
Before you can submit a research proposal, researchers/investigators must be added to your profile.

Click on "Manage Researchers" to continue.



The "MY RESEARCHERS" page is where you will add and manage the information relating to all your research proposal team members, or any other individuals you would like to "link" to a given research proposal. How to "link" researchers will be explained at a later stage.

When this page is loaded for the first time, you will notice that there are no persons registered. The next step would be to click on the "Add Researcher" button. See example below:

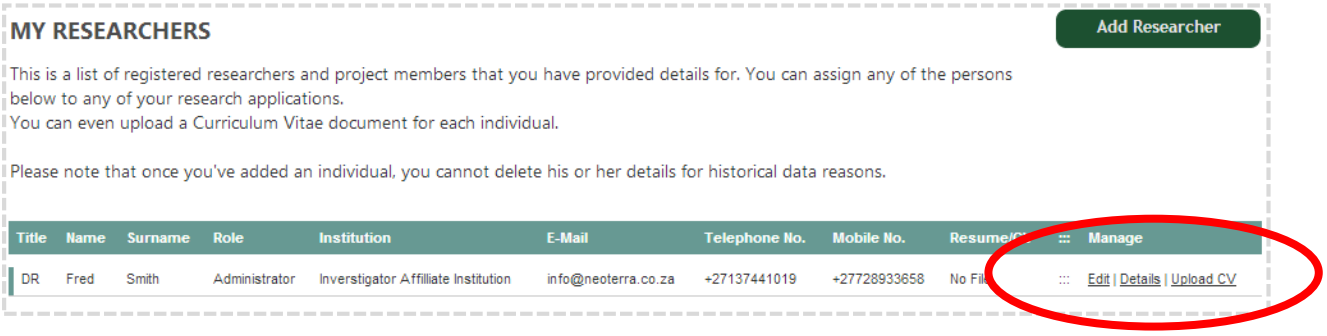


This will load the "Investigator Details Submission Capture" page. Here, you can capture details about yourself as well as researchers and investigators who will be involved with your research study. This information is required by most Research Committees.

Please complete this form, as you will not be able to submit a research proposal unless at least one researcher has been defined

Once you have completed this form, click on "Save" to continue.

Your list of "My Researchers" will now show the newly added individual.

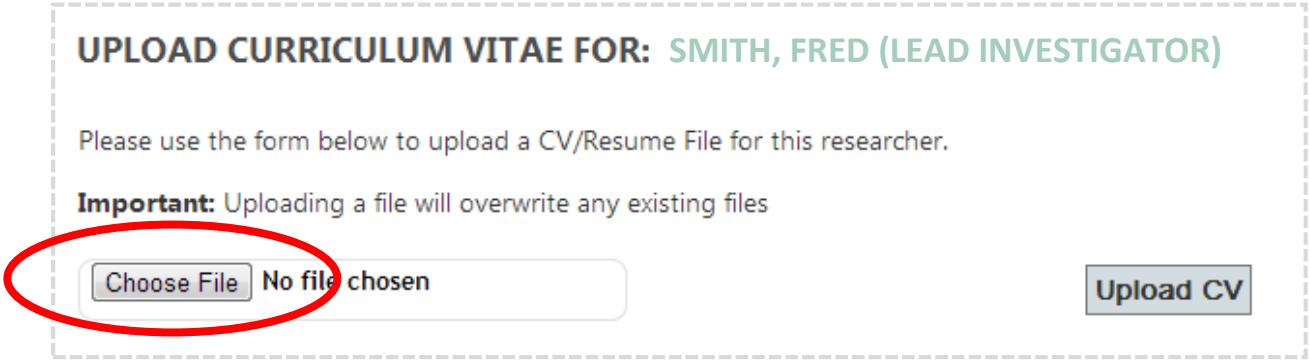


You now have a few more options available to you. The profile of each individual researcher can be modified by clicking on "Edit". To view each researcher's profile, click on "Details".

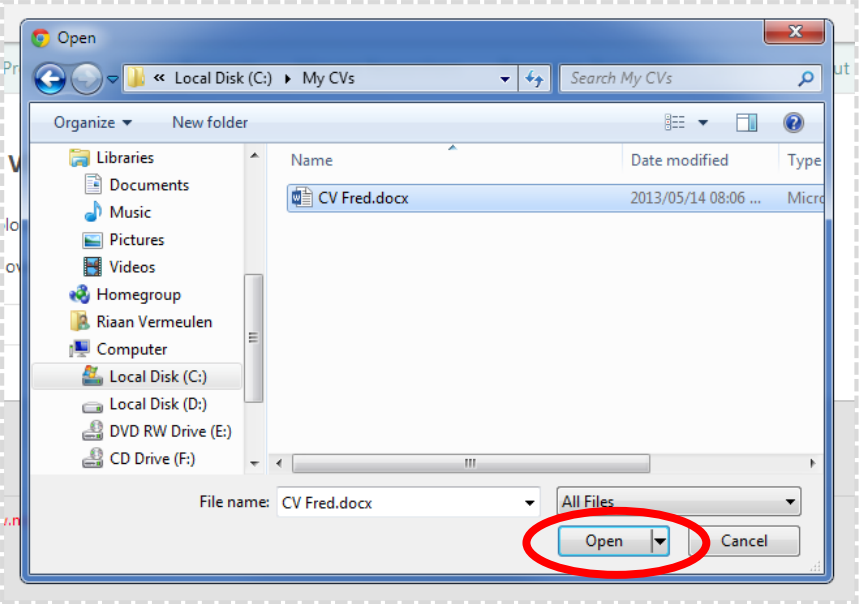
Lesson 2 - How to upload a curriculum vitae

Most Research Committees require that applicants submit a curriculum vitae or résumé for each member involved with a research study. You can do this by clicking on the "Upload CV" link.

Follow these steps to upload a curriculum vitae / résumé for a researcher.

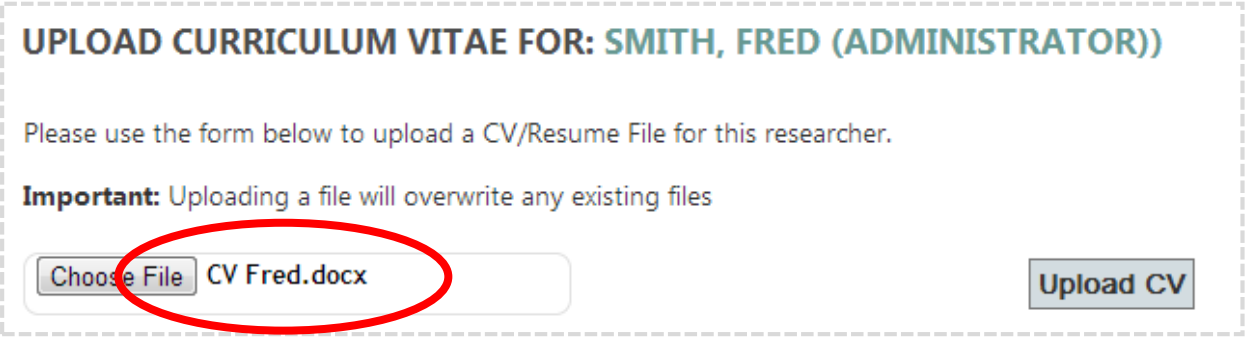


Click on "Choose File". This will open the browser dialogue.

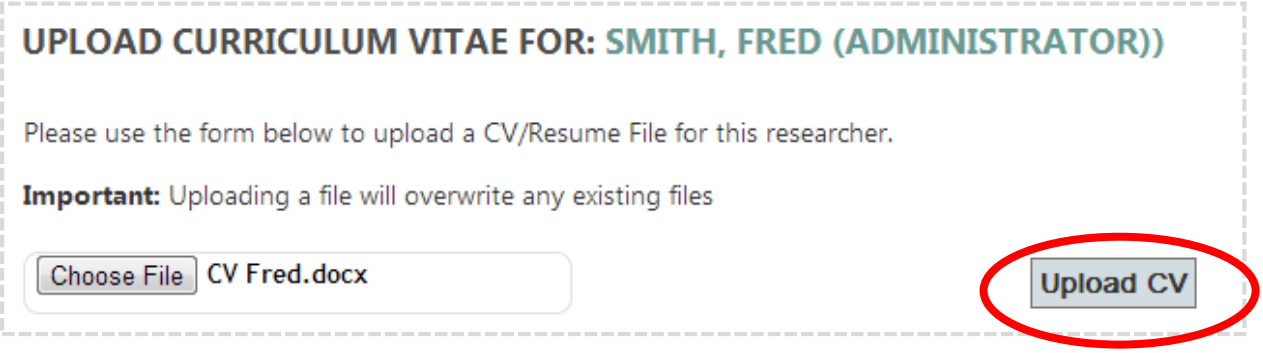


Using the browser, go to the file you would like to upload, select it using the mouse, and then click on "Open".

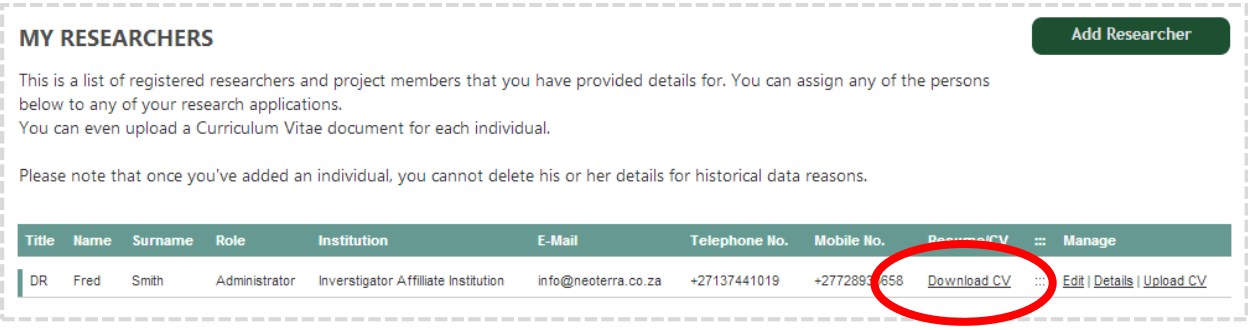
You will now see your file next to the "Choose File" button.



Next, click on the "Upload CV" button to upload the file and store it in the NHRD system.



You will see that a downloadable file is now linked to the individual's record. This provides research committees with access to the CV.



Summary – Module 3

Repeat the steps in this module to add as many researchers as you like.

Later, you will learn how to link researchers to research proposals.

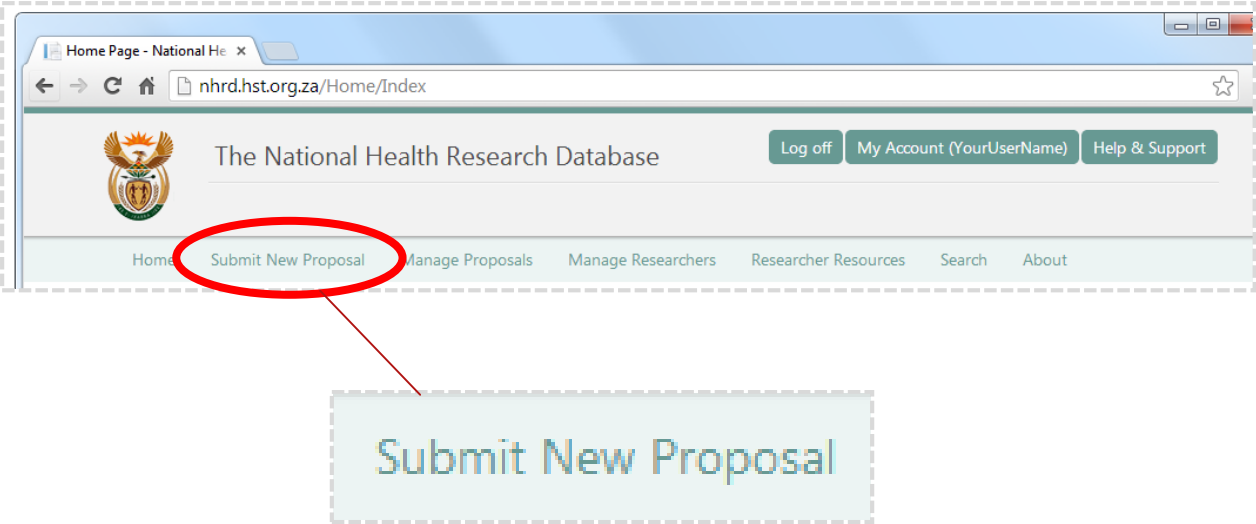
You have to follow this process only once. Researcher details, including their CVs, are saved and linked to your profile.

Module 4 – Apply for research

Lesson 1 - How to submit a research proposal

Now that you have registered and added researchers to your profile, you are ready to submit your research proposal.

To start, click on the "Submit New Proposal" menu item in the main navigation bar.

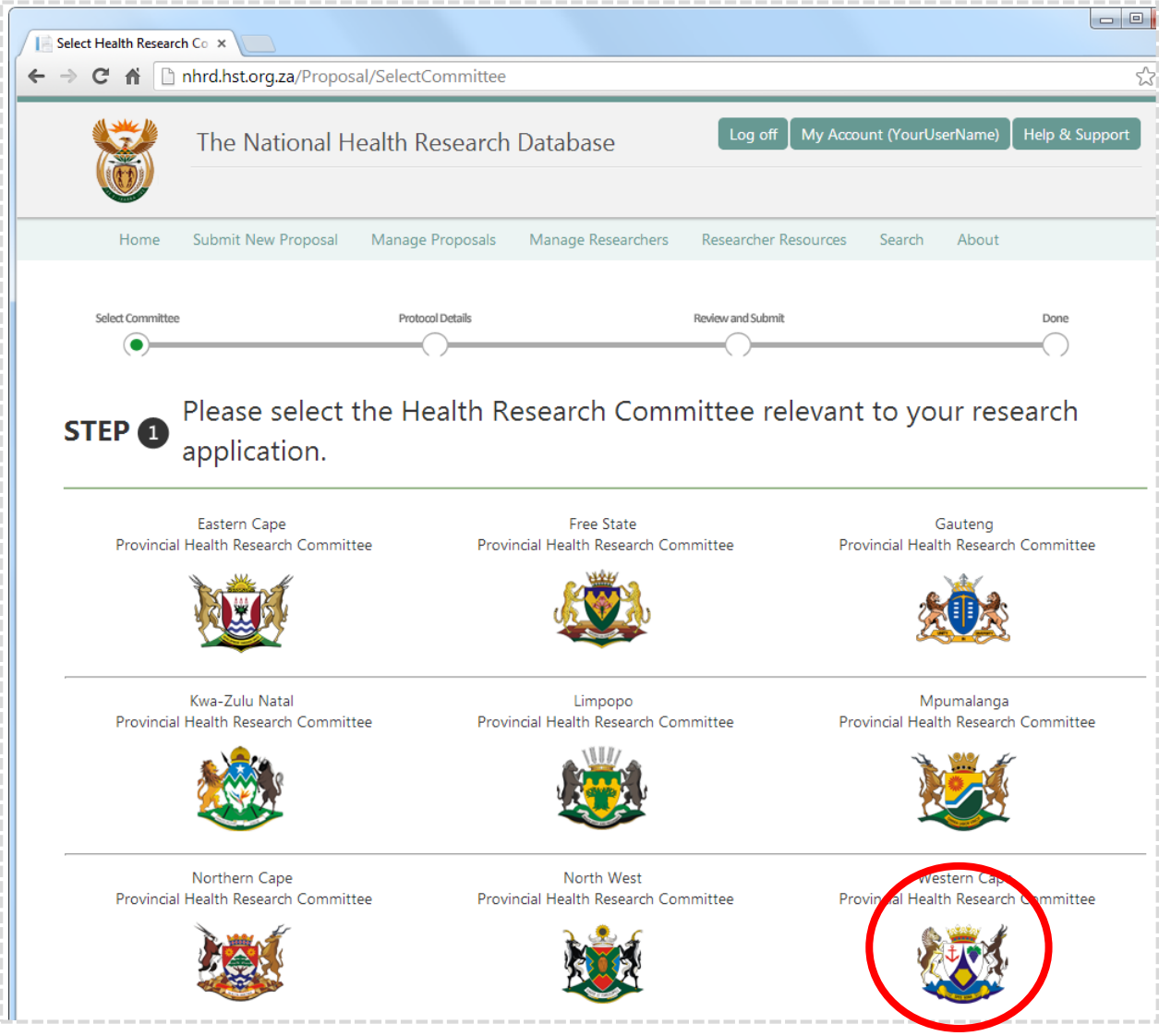


To submit a research proposal, follow these five steps:

Step 1 – Choosing a Research Committee

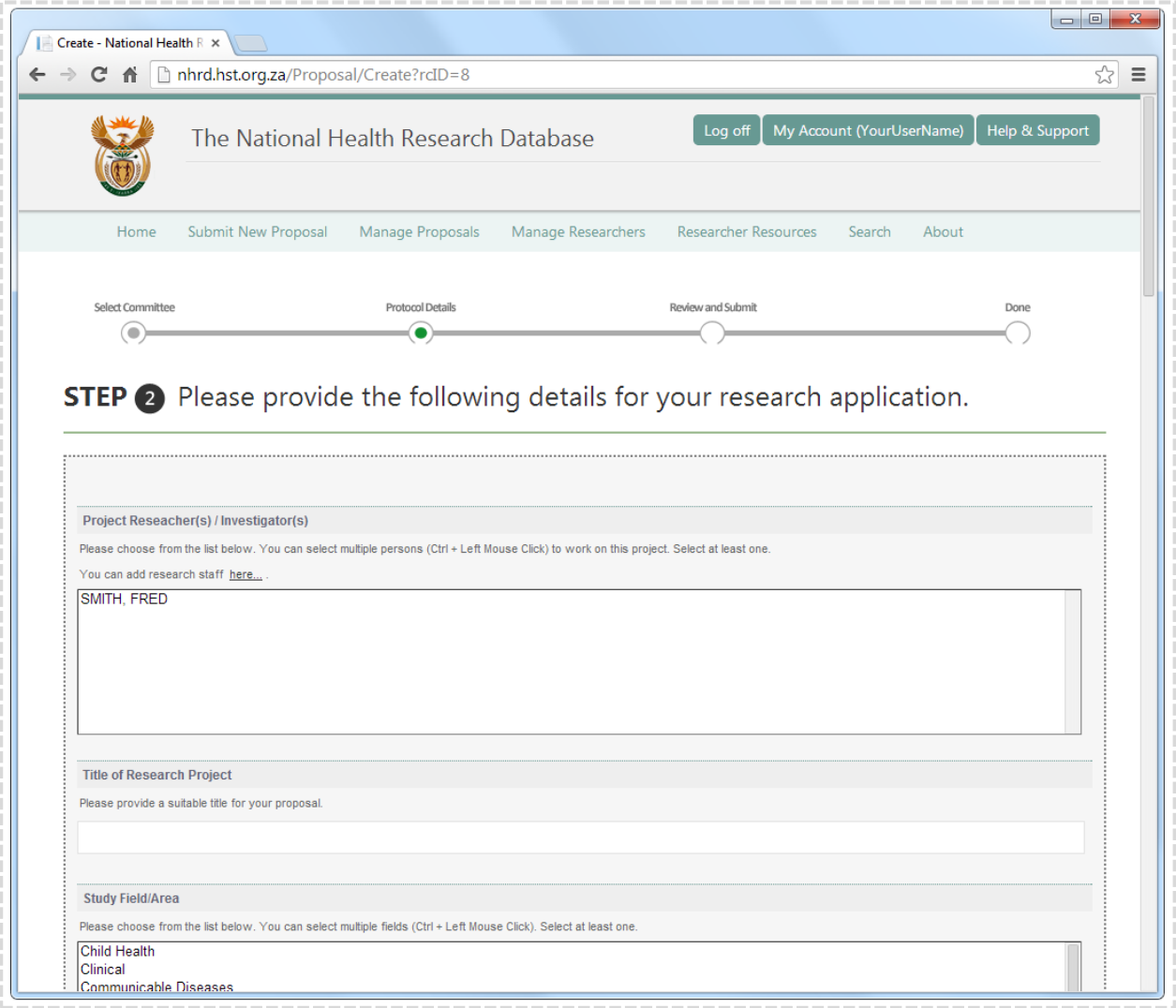
Choosing the Research Committee that is relevant to your research proposal is essential. This decision will be based on the location of your study. Each province has a provincial Research Committee that will be responsible for processing your application. You can only choose one Research Committee per application. Therefore, if you are planning to conduct research in more than one province, you will have to apply independently to the *relevant* Provincial Health Research Committee. Select the relevant Research Committee by left-clicking on the committee image signified by the provincial coat-of-arms icons.

For example: If you want to apply to the Western Cape Research Committee, click on the image as shown below:



Step 2 – Complete the application form

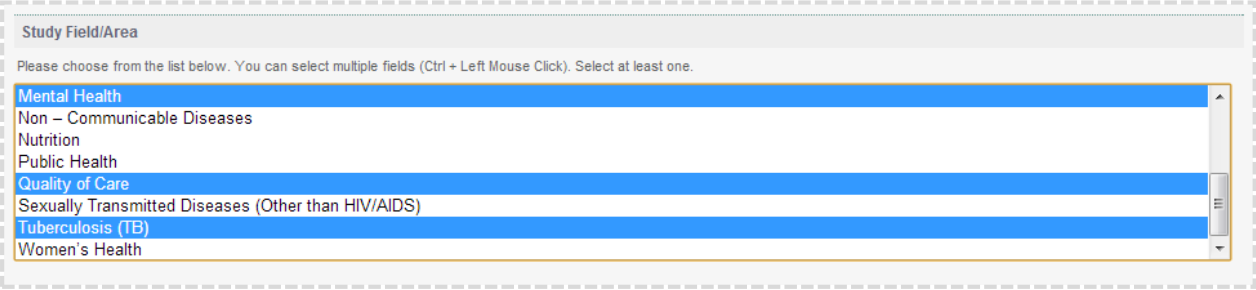
The details and information required by Research Committees are combined into a single page. Please note that some attributes are mandatory, and must be completed before the form can be saved or submitted.



Remember: It is important to understand the "Project Researcher(s)/Investigator(s)" section. Here you will need to select individuals from the list of researchers that you supplied in **Module 3**. If you do not have any data in this section, you will have to return to Module 3 and add your team members. A **link** is also provided on this page.

Many of the input fields, such as the Study Field/Area referred to as "Burden of Disease", allow you to select more than one value. To select multiple values, hold the Ctrl key and left-click the mouse on the values relevant to your application.

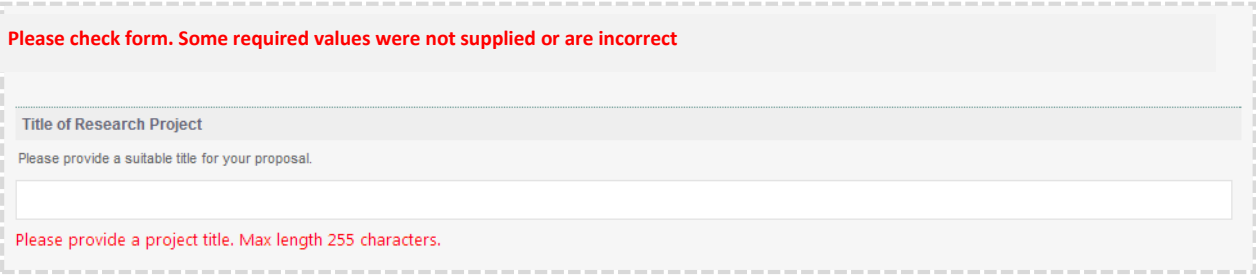
See example below: here you can select your Study Fields/Areas using this method.



Ensure that you **do not let go of the Ctrl key** while selecting values, as this will result in single values being selected.

Most of the attributes in this form are mandatory. Certain constraints apply to these attributes, and the information you provide will be subjected to quality checks. If you have not supplied a value for a required field, or have supplied invalid information, a validation error message will alert you.

This is an example of a typical error message:



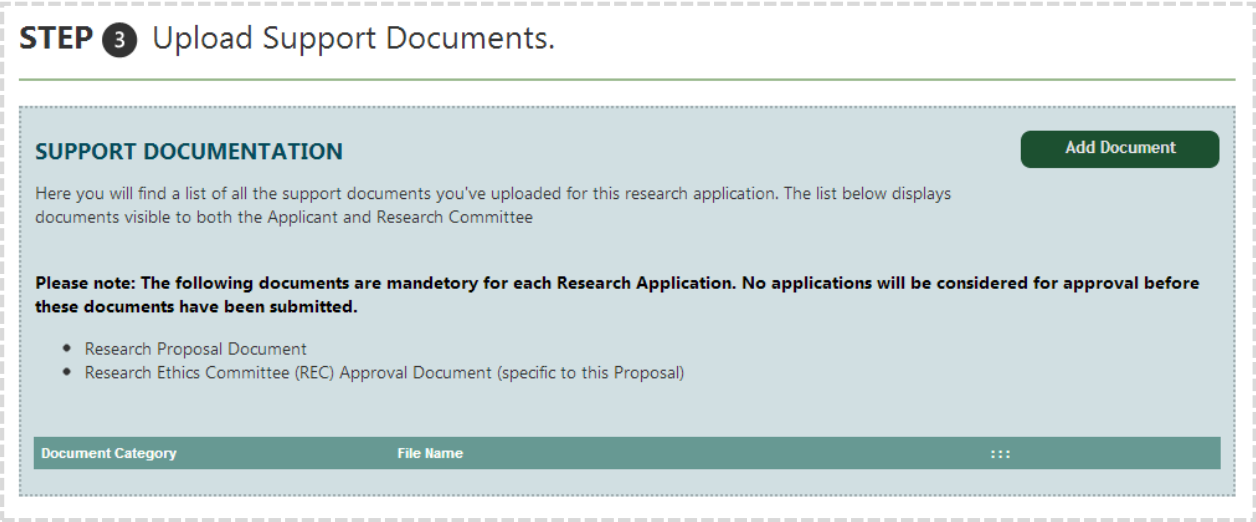
Please take note of the warning messages and take the necessary steps to rectify the problem. You will **not** be able to submit your application until all validation messages have been cleared.

Step 3 – Upload supporting documentation

Depending on the type of research involved, you are required to upload certain documentation. For example, the following is mandatory:

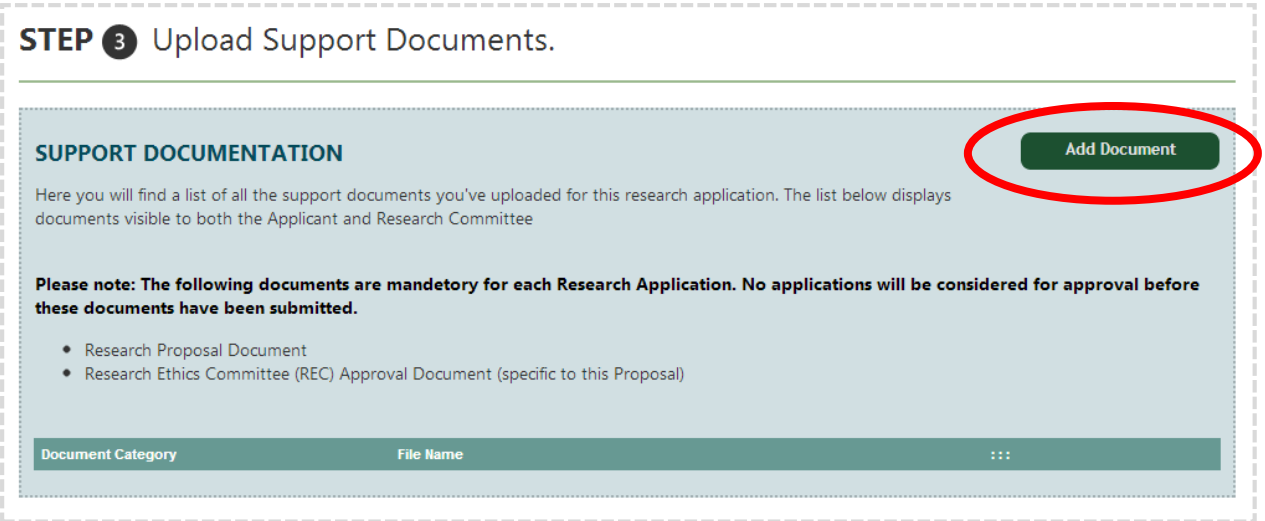
1. National Clinical Trials Registration documentation (if you are planning to perform a clinical trial)
2. Ethics Committee approval documentation
3. Research proposal document

For example:

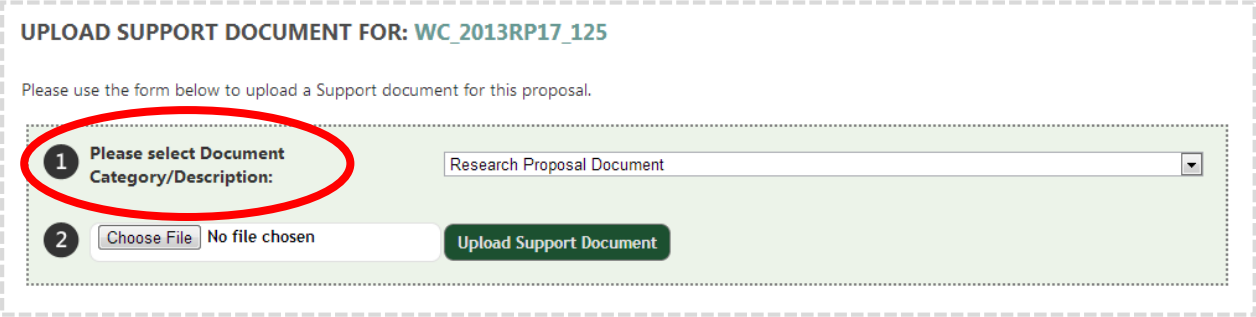


Remember: You will not be able to submit a research proposal until the supporting documentation requirements have been met. You can download templates of the supporting documentation from the "Resources for Researchers" section.

To upload a document, click on the "Add Document" button.

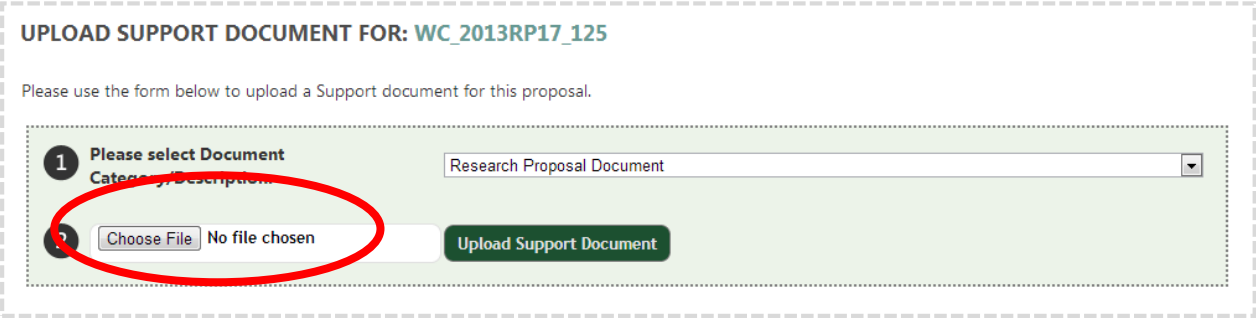


This will load the "UPLOAD SUPPORT DOCUMENT" form.



First, select the Document Category/Description.

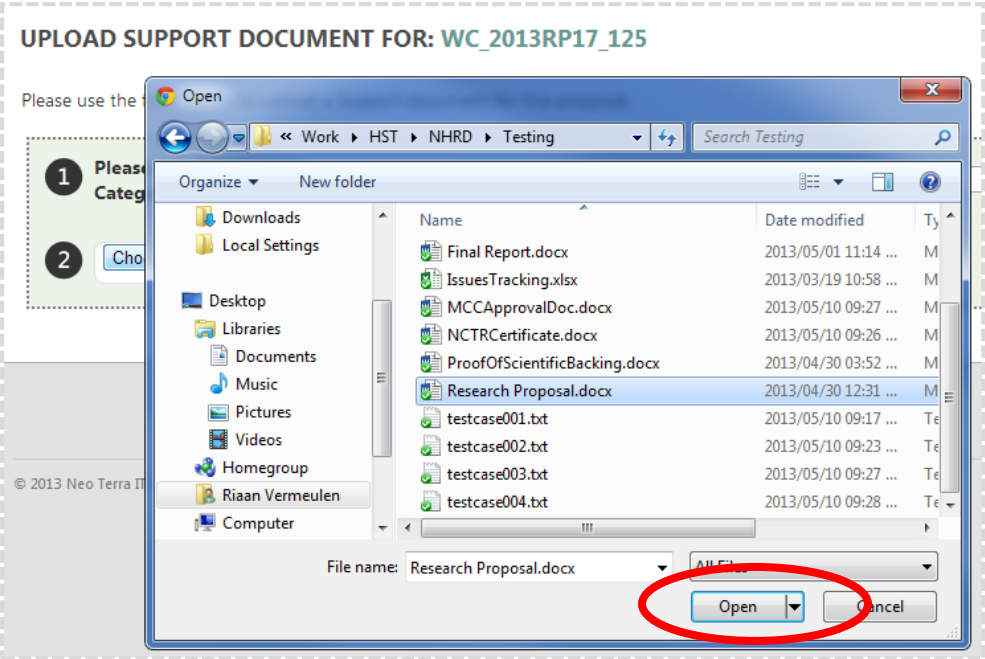
Then click on "Choose File".



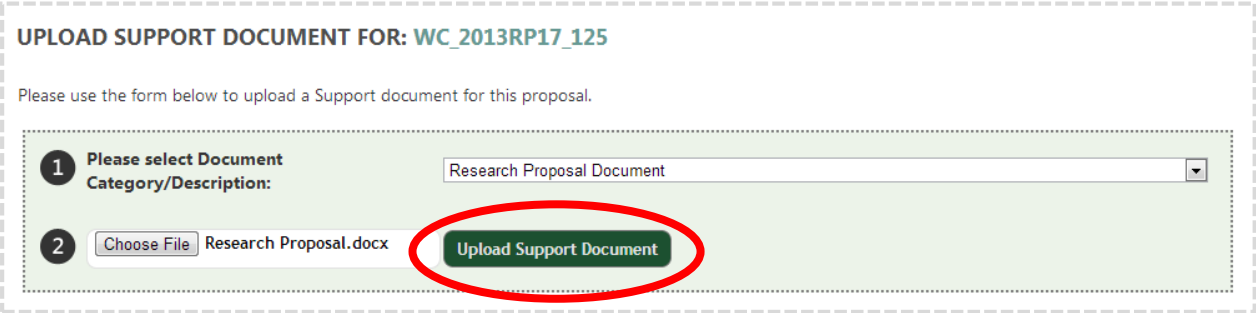
Browse to the specific file using the "Open File Dialogue" form.

Select the file using the mouse, and click on "Open" to proceed.

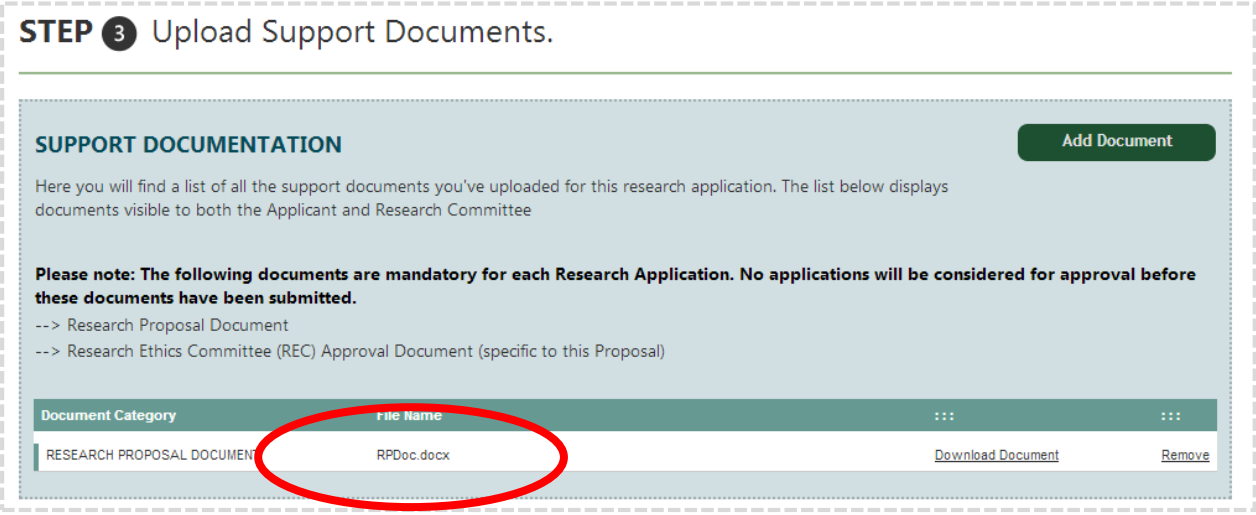
For example:



Finally, click on "Upload Support Document" to save your document and link it to your proposal.



After you have uploaded the document, it will appear in your Support Document list. See the example below:



Ensure that you repeat this step until you have uploaded all the documents required for your research proposal.

It is possible to delete an incorrectly uploaded document.

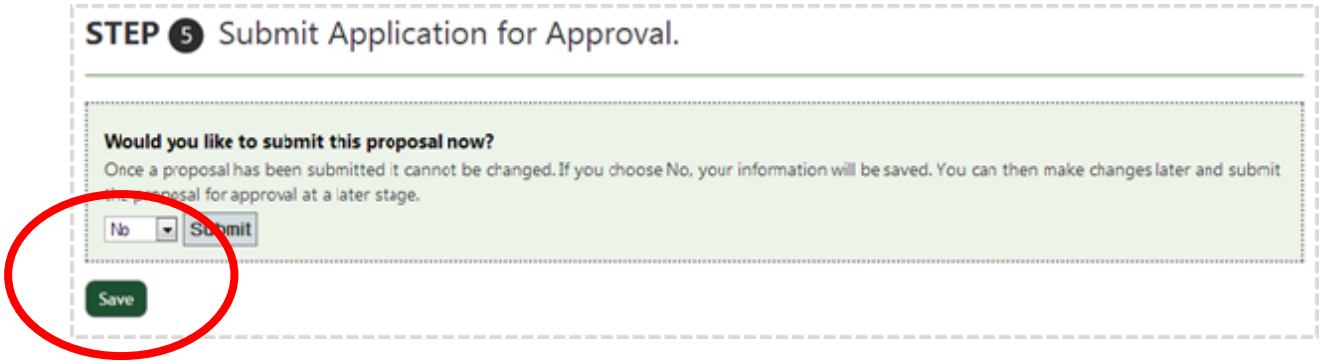
Step 4 – Review submitted information

This step requires you to review your data before proceeding. This will allow you to ensure that your information is complete and accurate.

By default, your application details are hidden. Click on "Show" to view your details.

Step 5 – Submit your data

If you are satisfied that your research application is complete and that you have supplied all of the necessary supporting documentation, you can submit your proposal.



Alternatively, you can choose to save your application for now and come back to it at a later stage. This may be necessary if you are waiting for some information or supporting documentation. Bear in mind that Research Committees will not be aware of your application until you have submitted it.

Summary – Module 4

Before you can submit a research proposal online, you must be registered on the system.

Before you proceed, you must capture the details of at least one researcher/investigator in the "My Researchers" section.

You also need electronic copies of certain documents. The documents you will always require include:

- Research proposal document
- Ethics approval document

If you are planning to perform a clinical trial, you will also need to submit your

- National Clinical Trials Register Number
- All documentation related to the clinical trials approval and registration process

The process of submitting a proposal online consists of the following five steps:

1. Select the Research Committee relevant to your application
2. Complete the research proposal online form
3. Upload all of your electronic documents as required
4. Review your application
5. Submit and save your application

Once you have completed this process, you will be provided with a unique reference number that is associated with the province to which you applied, the year of application, and the number sequence of your application. Cite this number in all related communication. Your reference number also allows you to track the application process.

Module 5 – Manage research proposals

By now, you should be able to:

- Register members of your research team
- Upload a curriculum vitae
- Submit an online research proposal
- Upload supporting documents for research proposals

The NHRD website has a feature that allows you to view all the research proposals you have previously submitted or saved. The "MY RESEARCH PROPOSALS" page will show you:

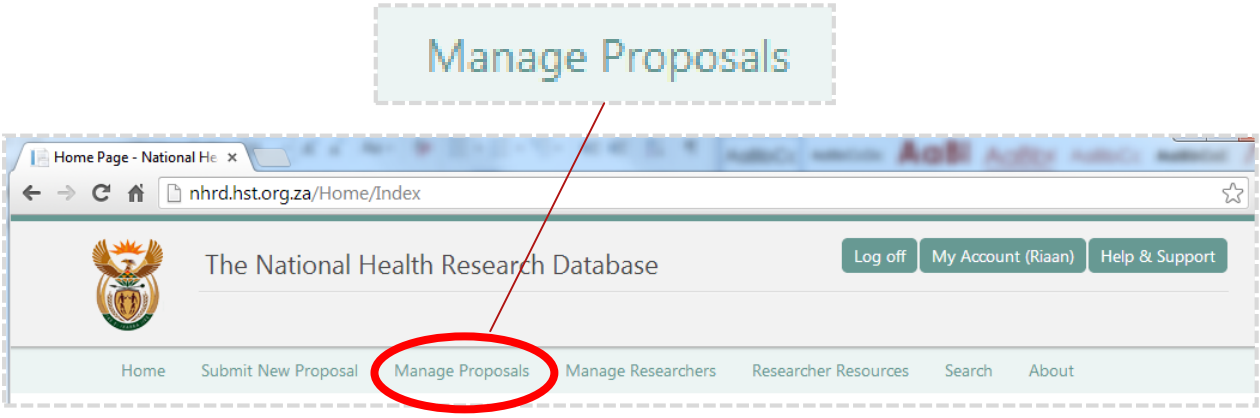
- A list of reference numbers for each proposal
- Whether a proposal has been submitted or not
- The status of your application (pending, approved, declined, or referred to applicant for changes)
- The title of your research studies
- The status of the project (ongoing or finished)
- The estimated completion date

Functions on this page enable you to upload additional supporting documents, and to view or add comments to your proposals.

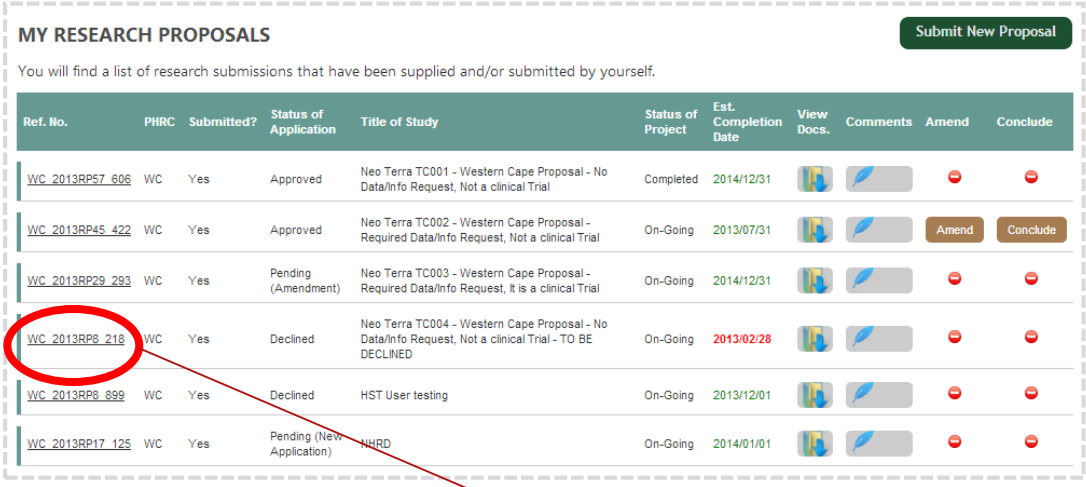
The Comments feature is the primary means by which Research Committees can send you information related to your proposal. You can also add your own comments relevant to the study. Research Committee members will be able to view and reply to your comments using the same functionality.

Lesson 1 – Managing existing proposals

The following example shows how you can view and manage existing proposals. To access this page, click on the "Manage Proposals" menu item in the main navigation bar.



This will bring you to the "MY RESEARCH PROPOSALS" page.



To view the details of each proposal, click on the unique reference number found in the first column.

Use your "MY RESEARCH PROPOSALS" page to view and add material on the Support Documents and Comments pages.

For example:

MY RESEARCH PROPOSALS Submit New Proposal

You will find a list of research submissions that have been supplied and/or submitted by yourself.

Ref. No.	PHRC	Submitted?	Status of Application	Title of Study	Status of Project	Est. Completion Date	View Docs.	Comments	Amend	Conclude
WC_2013RP57_606	WC	Yes	Approved	Neo Terra TC001 - Western Cape Proposal - No Data/Info Request, Not a clinical Trial	Completed	2014/12/31				
WC_2013RP45_422	WC	Yes	Approved	Neo Terra TC002 - Western Cape Proposal - Required Data/Info Request, Not a clinical Trial	On-Going	2013/07/31			Amend	Conclude
WC_2013RP29_293	WC	Yes	Pending (Amendment)	Neo Terra TC003 - Western Cape Proposal - Required Data/Info Request, It is a clinical Trial	On-Going	2014/12/31				
WC_2013RP8_218	WC	Yes	Declined	Neo Terra TC004 - Western Cape Proposal - No Data/Info Request, Not a clinical Trial - TO BE DECLINED	On-Going	2013/02/28				
WC_2013RP8_899	WC	Yes	Declined	HST User testing	On-Going	2013/12/01				
WC_2013RP17_125	WC	Yes	Pending (New Application)	NHRD	On-Going	2014/01/01				

Click on this icon to view all supporting documentation for this particular research proposal. You can add new documents at any time.

Click on this icon to view comments related to your proposal. This is a very important tool to communicate and record issues related to your study.

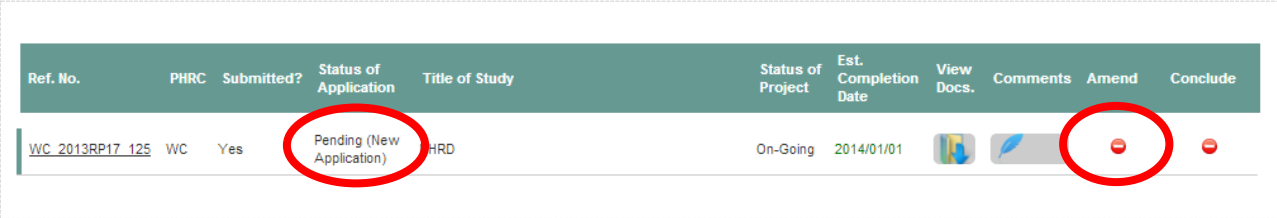
Lesson 2 – Application status categories

The status of your application can be drawn from one of five categories:

Pending (New Application)

This is the status for all new applications **not yet** processed by the Research Committee. Your application could take up to six weeks to be assessed.

For example:



Ref. No.	PHRC	Submitted?	Status of Application	Title of Study	Status of Project	Est. Completion Date	View Docs.	Comments	Amend	Conclude
WC_2013RP17_125	WC	Yes	Pending (New Application)	HRD	On-Going	2014/01/01				

Until it has been approved or reverted to you for changes, you will NOT be able to make any amendments to your submission. You will also NOT be able to conclude the study during this phase.

Approved

This means that your application has been reviewed and approved by the relevant Research Committee. You will now be able to proceed with your study as set out in your research proposal.

For example:

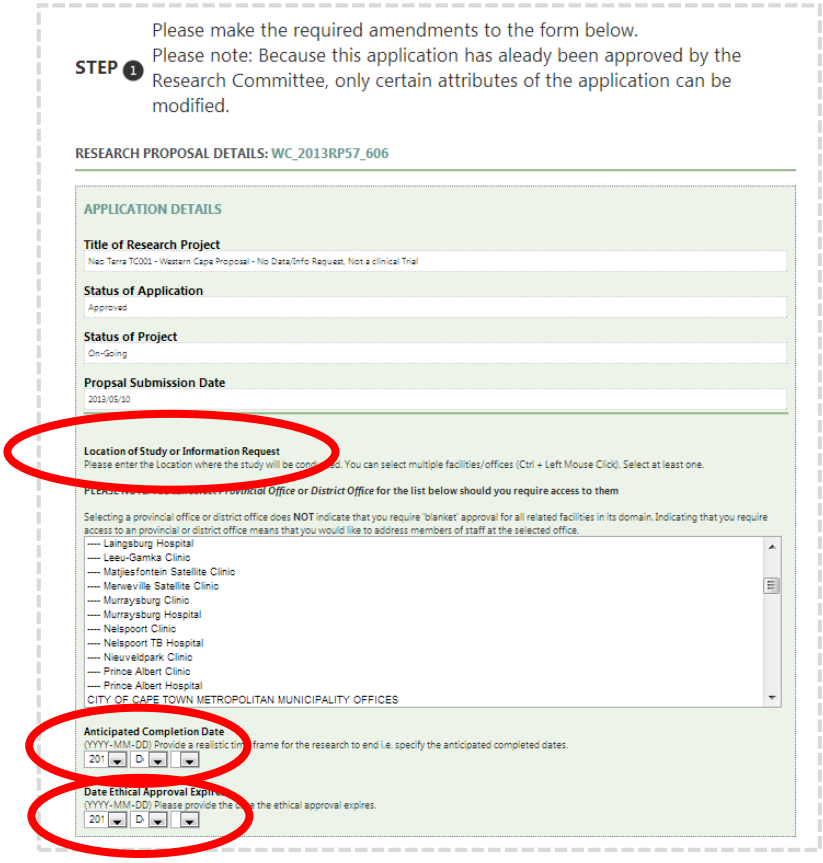
Ref. No.	PHRC	Submitted?	Status of Application	Title of Study	Status of Project	Est. Completion Date	View Docs.	Comments	Amend	Conclude
WC_2013RP57_606	WC	Yes	Approved	Neo Terra TC001 - Western Cape Proposal - No Data/Info Request, Not a clinical Trial	On-Going	2014/12/31			Amend	Conclude

After it has been approved, you will be allowed to make some amendments to your study proposal.

Click on "Amend" to:

- Modify the location of study
  You may have to add new facilities or locations to your study.
- Edit the anticipated/estimated completion date
  Factors beyond your control may have resulted in delays. Use this feature to apply for an extension. Your application will be reviewed by the relevant Research Committee.
- Change the ethics approval expiration date
  If you require more time to complete your research, you will have to ensure that your ethics approval covers your new timeframe. Once you have been given an extension, you can modify your original date here.

For example:



Pending (Amendment)

If you have made an amendment after your original proposal was approved, your application will be designated with this status. Your application will be flagged for a second approval screening by the Research Committee. Once approved, you can continue with the proposed study.

For example:

Ref. No.	PHRC	Submitted?	Status of Application	Title of Study	Status of Project	Est. Completion Date	View Docs.	Comments	Amend	Conclude
WC_2013RP29_293	WC	Yes	Pending (Amendment)	Neo Terra TC003 - Western Cape Proposal - Required Data/Info Request, It is a clinical Trial	On-Going	2014/12/31				

Revert to applicant for changes

This means there is an element of your proposal that will have to be modified BEFORE the Research Committee can approve your application. Please check the Comments section of your application for details. Make the required changes and resubmit your application.

Declined

This status confirms that your application has not met the requirements set by the Research Committee for approval. You may NOT proceed with the proposed study.

For example:

Ref. No.	PHRC	Submitted?	Status of Application	Title of Study	Status of Project	Est. Completion Date	View Docs.	Comments	Amend	Conclude
WC_2013RP8_218	WC	Yes	Declined	Neo Terra TC004 - Western Cape Proposal - No Data/Info Request, Not a clinical Trial - TO BE DECLINED	On-Going	2013/02/28				

Summary – Module 5

The "MY RESEARCH PROPOSALS" page will show you:

- A list of reference numbers for each proposal
- Whether a proposal has been submitted or not
- The status of your application (pending, approved, declined, or reverted to applicant for changes)
- The titles of your research studies
- The status of the project (ongoing or finished)
- The estimated completion date

Functions on this page enable you to upload additional supporting documents, and to view, edit, amend and add comments to your proposals.

Student Notes